End
User   16, 18

14

30

12

16, 18   18, 16

End   End
User   30   30   User

150   10   21

Database   Central   Multi
              Server   Server

FIG 1

Administrator
Work Station
60

Admin. Subsystem
140

Database
API - 110'

Database Server
50

Database Subsystem

Disk Subsystem

Database
150

110

190

Billing
API
100'

100

Director
23

40

Web Server

Billing Subsystem

Web Subsystem

30

Comm.
API - 120'

70

Communications Server

Comm. Subsystem

Batch Subsystem
125

120

Firewall
90

End User
80

Browser

E-Mail

16, 18

Cell
Phone

135

Fax

Figure 2

Figure 3

Web Subsystem

Database API — 110'

70

Database Subsystem — 110

Database — 150
- User Data
- Content
- User Preferences
- Sponsors
- Banners
- User History
- Logs

Database Server

50

Library — 130

Admin. Subsystem

Database API — 110'

140

Banners
Ways to promote your services – see 50 banners available for your use.

Announcements
Communicate more effectively – over 65 examples to use

Reporting
State of the art OLAP cubes

FIG 4

OBERMAYER REBMANN MAXWELL & HIPPEL LLP

Philadelphia, PA   Harrisburg, PA   Pittsburgh, PA   Cherry Hill, NJ   Vineland, NJ   Wilmington, DE

| Home | Firm Overview | Practice Areas | Attorneys | Contact Us | Offices | Friday, October 19, 2001   ~200

Without an Estate Plan, you could end up paying 55% of your life's work to Uncle Sam.   ~211

| Change Categories | Add Team Member | Task Report | New Task | Refer Associate | Unsubscribe | Feedback | Help |

Hi, Jane. Here are your BizActions interest items and reminders for today: ~202

Obermayer Rebmann Maxwell & Hippel Announcements	

2001 Fall Seminars	SB1048

Our Labor Relations and Employment Law Department will be hosting two Breakfast Briefings this Fall. The first of the two seminars, *"The FLSA: Why Salaried Doesn't Always Mean Exempt"*, will be held on October 10, 2001 and the second seminar, *"The ABC's of EPLI"* will be held on November 14, 2001.

More Info	Tasks	Contact Me

Corporate and Business	

What is a Private Offering of Securities and Should Your Company Make One?	BR6

New entrepreneurs and venture businesses are faced with a complex array of options when it comes to raising significant capital for start-up, expansion, and other needs. Aside from "Angel Investment", family money, revolving lines of credit, and mezzanine financing, one popular and effective means of raising capital is through a "private placement" of securities by your company. But what exactly is a private placement and how does it work? Copyright©, 2001

204

Full Article	Tasks	Contact Me	Books

Estate, Probate and Trusts	

Three Important Auxiliary Estate Documents	BR9

Three auxiliary documents are particularly important to include in a portfolio of information pertinent to your estate. These are a General Durable Power of Attorney, an Advance Health Care Declaration and Personalized Instructions. Such information provides very helpful supplements to your will and related materials. Copyright©, 2001

Full Article	Tasks	Contact Me	Books

Employment and Labor	

~206

Questions and Answers for Employers on Military Leave Under The Uniformed Services Employment and Reemployment Rights Act	BR13

An important question for many employers in the near future may be to determine their responsibilities to employees who are called to military service. The Uniformed Services Employment and Reemployment Rights Act clarifies issues such as eligibility, leave requirements, benefits and conditions of reinstatement. Copyright©, 2001

Full Article		Tasks		Contact Me		Books

Bankruptcy

Bankruptcy: Fresh Start Choices For Start-Up Companies	BR510

Unfortunately, the recent economic decline has left many new start-ups with no alternative but to consider what options may exist for them in bankruptcy or reorganization. Although "bankruptcy" has often carried a negative stigma, depending upon which type of bankruptcy a company chooses, it may actually allow a company to either totally dissolve or simply reorganize its debt in order to emerge stronger and more efficient for the future. Copyright©, 2001

Full Article		Tasks		Contact Me		Books

Do you want to make wise investments?

	Change Categories		Add Team Member		Task Report		New Task		Refer Associate		Unsubscribe	Feedback	Help

Your Business Reminders

Evaluation   Due Date: November 08, 2001
Schedule semi-annual evaluations for direct hires

Forward/Assign		View Report		Edit Task		History		Mark Complete

Your Personal Reminders

Anniversary   Due Date: October 08, 2001
Don't forget to buy an anniversary present

Forward/Assign		View Report		Edit Task		History		Mark Complete

You owe it to your family...
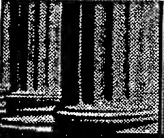
Update Profile		Unsubscribe		Privacy		Disclaimer		© 2001, BizActions, LLC

FIG 4
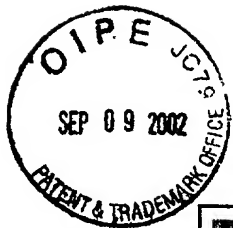
OBERMAYER REBMANN
MAXWELL & HIPPEL LLP

Philadelphia, PA   Harrisburg, PA   Pittsburgh, PA   Cherry Hill, NJ   Vineland, NJ   Wilmington, DE

BizActions™ for Your Employees
Grow Your Business One Message at a Time...

Full Article	

2001 Fall Seminars   BA1048

October 10, 2001, Wednesday
The FLSA: Why Salaried Doesn't Always Mean Exempt

Learn the difference between exempt and non-exempt, how to handle employees who work in several locations and/or at different rates of pay and how to classify difficult job descriptions, including, for example, information technology personnel. Bring your problem job descriptions along!

Location:
Wyndham Franklin Plaza Hotel
17th & Race Streets
Philadelphia, PA

Time:
Registration & Continental
Breakfast - 8:00 a.m. to 8:30 a.m.
Program - 8:30 a.m. to 10:30 a.m.

Presenters:
Lori E. Halber & Jacqueline Z. Shulman

Please register by Wednesday, October 3, 2001.

FIG 5

November 14, 2001, Wednesday
The ABC's of EPLI

Are you thinking about employment practices liability insurance? Employers increasingly are looking to EPLI to insure against the potential liabilities arising out of personnel decisions made in today's litigious workplace. The insurance market is no place for the uneducated consumer. The ABCs of EPLI will explain what you should be looking for and what you should avoid in an EPLI policy.

Location:
Wyndham Franklin Plaza Hotel
17th & Race Streets
Philadelphia, PA

Time:

Time:
Registration & Continental
Breakfast - 8:00 a.m. to 8:30 a.m.
Program - 8:30 a.m. to 10:30 a.m.

Presenters:
James M. Penny, Jr. & Joseph J. Centeno

Please register by Wednesday, November 7, 2001.

For Reservations: Call the Breakfast Briefing Registration Hotline (215) 665-3100; e-mail us at info@obermayer.com ; or register on-line.

Cost: There is no charge for these briefings.

When you register, let us know what issues you would like us to address.

Please note that seating is limited, so advance registration is required.

Click here to add this item as a task.

E16 (cont)
5 cont

Your Comments						
Is this item worthy of consideration of implementation?	Yes	O	No	O	Maybe	O
Is this item worth sharing with other associates?	Yes	O	No	O	Maybe	O
Did this item present value to you and your business?	Yes	O	No	O	Maybe	O

Comments:

Submit Your Comments

OBERMAYER REBMANN MAXWELL & HIPPEL LLP

Overview of Sample Interest Categories
1 – Sponsor selects initial default Interest Categories to deliver to
2 – Users can change Interest Categories at any time.
3 – BizActions™ technology builds a SINGLE custom email for eac based on their Interest Category selections.
4 – BizActions™ delivers weekly articles for each Interest Categor

With BizActions, your client controls the information and reminders that they want to receive. The BizAct Interest categories are expanding all of the time, as we develop additional areas of content. The followin the Interest Categories available for selection. The standard pricing includes a selection of any 9 categor Additional categories may be purchased in groups of 3.

☑ Administrative
☐ Automotive/Lemon
☐ Banking & Finance
☑ Bankruptcy
☑ Commercial
☑ Construction
☐ Corporate & Business
☑ Family
☐ Employment & Labor

☑ Entertainment
☑ Environmental
☑ Estate, Probate, and Trusts
☑ General Litigation
☐ Intellectual Property
☐ Internet and New Media
☑ Medical and Health Care
☐ Personal Injury
☑ Real Estate

All articles have been t and reviewed by the la Obermayer Rebmann N Hippel LLP based in Ph Penn. For additional in www.obermayer.com a Fields at sfields@obern

214

To Law
Center

Category Descriptions

Disclaimer | Privacy Statement | Feedback | Press Releases | What's New | Copyright 200?

E16 6

FIG (cont)

Create Sponsor Default Interest Preferences

As a sponsor, you can preset the default interest categories for all new members, prospects and referrals that fa under your sponsorship. You should select categories that are most relevant to your client base. Keep in mind t these are just defaults. Members may reset these at any time after enrollment. Please note that if you do not as point of contact to a category that you select, we will automatically assign the lead sponsor point of contact to th category.

Select	Interest Category	Topic	Contact Person
☑	Sales	Primary Category	
☑	Sales	Management	
☐	Sales	Opportunities and Support	
☐	Sales	Pricing	
☑	Marketing	Primary Category	
☑	Marketing	Marketing Plans	
☐	Marketing	Direct Mail	
☑	Human Resources	Primary Category	
☐	Human Resources	Training	
☑	Human Resources	Government Regulations	
☐	Human Resources	Hiring	
☑	Human Resources	Compensation and Benefits	
☐	Human Resources	Employee Retention	
☑	Business Finance	Primary Category	
☑	Business Finance	Financing	
☑	Business Finance	Cash Management	
☑	Business Finance	Investing	
☑	Business Finance	Collection Strategies	
☐	Business Finance	Insurance	
☑	Personal Finance	Primary Category	
☐	Personal Finance	Financial Planning	
☑	Personal Finance	Retirement Planning	
☑	Management	Primary Category	
☑	Management	Leadership	
☑	Management	Organizational	
☑	Operations	Primary Category	
☐	Operations	Inventory Management	

☑	Operations	Computers, Technology and Networking	
☑	Operations	Business Travel	
☑	Operations	Purchasing	
☑	Operations	Internal Controls	
☑	Business Tax	Primary Category	
☑	Business Tax	Business Succession	
☐	Business Tax	Sale/Transfer of Business	
☑	Business Tax	Capital Contributions and Distributions	
☑	Business Tax	Business Expenses	
☑	Business Tax	Retirement Plans	
☑	Business Tax	Tax Planning	
☑	Personal Tax	Primary Category	
☑	Personal Tax	Wealth-Building	
☑	Personal Tax	Retirement Planning	
☑	Personal Tax	Insurance	
☑	Personal Tax	Wealth Accumulation and Preservation	
☑	Personal Tax	Filing Strategies	
☑	Personal Tax	Tax Planning	
☑	What's Happening?	What's Happening?	
☑	Personal Tax	Charitable Contributions	
☑	Sponsor Messages	Sponsor Events	
☑	Sponsor Messages	Press Release	
☑	Sponsor Messages	Announcement	
☑	Create a Profit Niche With NetLedger	Create a Profit Niche With NetLedger	
☐	Human Resources	Management/Supervision	
☐	Business Tax	Real and Personal Property	
☑	Marketing	Customer Loyalty	
☑	Business Development for CPAs	Business Development for CPAs	
☐	Using BizActions for Your CPA Firm	Using BizActions for Your CPA Firm	
☑	CPA Practice Management Tips	CPA Practice Management Tips	
☐	Consultant Spotlight	Consultant Spotlight	
☐	Technology	Internet Marketing	
☐	Technology	Equipment	

☐	Technology	Information Technology	
☐	Technology	Support	
☐	Product Spotlight	Product Spotlight	
☐	Company Spotlight	Company Spotlight	
☐	Sponsor	Sponsor	
☐	BizAction Admin Notices	BizAction Admin Notices	
☐	Intellectual Property	Intellectual Property	
☐	Association Announcements	Association Announcements	
☐	Sponsor Announcements	Sponsor Announcements	

Update   Reset

OBERMAYER REBMANN MAXWELL & HIPPEL LLP

Philadelphia, PA   Harrisburg, PA   Pittsburgh, PA   Cherry Hill, NJ   Vineland, NJ   Wilmington, DE

| Home | Firm Overview | Practice Areas | Attorneys | Contact Us | Offices |

BizActions™ for Your Employees
Grow Your Business One Message at a Time...

| Interests | Add Team Member | Report | New Task | Refer Associate | Unsubscribe | Feedback | Help |

Forward, Assign or Add Reminder

Reminder Title:	Evaluation
BizAction ID:	BA719
Mark Completed:	☐
Description:	Schedule semi-annual evaluations for direct hires
Date Due:	Month 11 Day 8 Year 2001 **Task Type:** Business
Recurring Task?	○ Annual ○ Quarterly ○ Monthly ○ Never
Assign to Project:	None **New Project: (Type in Name)**
Remind Me:	◉ Two Weeks Before ○ 1 Month Before **Priority:** ○ High ◉ Moderate ○ Low
History/Notes:	
Assign to Team:	Select One
Forward/Copy to Team:	Select One
Forward/Copy to other:	(Enter E-mail)

Add/Update Reminder   Reset

| Update Profile | Unsubscribe | Privacy | Disclaimer | © 2000, BizActions, LLC

FIG 7

OBERMAYER REBMANN
MAXWELL & HIPPEL LLP

Philadelphia, PA   Harrisburg, PA   Pittsburgh, PA   Cherry Hill, NJ   Vineland, NJ   Wilmington, DE

BizActions™ for Your Employees
Grow Your Business One Message at a Time...

Your Personal Action Plan

F168

George Smith, welcome to your personal action plan. This report displays tasks based on your selections. You
item history and edit any items by clicking on the 'Biz ID'.

Member:	George Smith					Status:	All
Date:	Tuesday, October 30, 2001					Type:	All

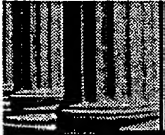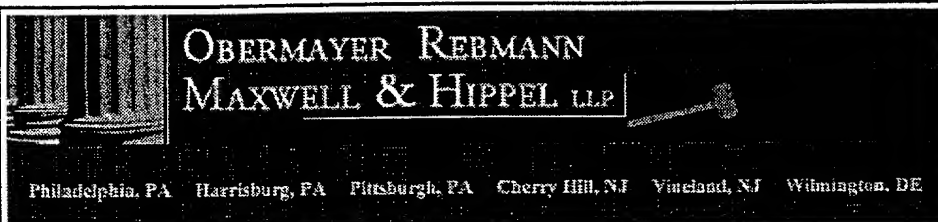| Biz ID	Due Date	Project	BizAction Title	Description	Priority	Item Type	Assignm
919	Sep-14-2001	None	Guard Against Losses From Employee Theft	Employee theft is a serious threat to *every* business. Learn how to protect your company today with these simple steps.	Moderate	Business	
843	Sep-05-2001	None	Setup Suggestion Incentives	None	Moderate	Business	
842	Sep-20-2001	None	Create direct mail plan	none	Moderate	Business	
771	Aug-20-2001	None	Title	Description	High	Business	To: Sm John
1113	Oct-18-2001	None	Make Your Sales Meetings a Three-Act Play	There's an easy way to land more clients with your sales calls. Just think of yourself as a director. Like acts in a play, your meetings should have an opening, middle and closing. Your professionalism is reflected in your ability to direct the sequence of events. Here are some guidelines.	Moderate	Business	To: Tho Bill
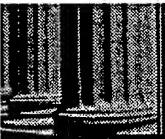
OBERMAYER REBMANN
MAXWELL & HIPPEL LLP

Philadelphia, PA   Harrisburg, PA   Pittsburgh, PA   Cherry Hill, NJ   Vineland, NJ   Wilmington, DE

| Home | Firm Overview | Practice Areas | Attorneys | Contact Us | Offices |

BizActions™ for Your Employees
Grow Your Business One Message at a Time...

| Interests | Your Team | Report | Add Reminder | Refer Associate | Unsubscribe | Feedback | Help |

Refer a Friend

To refer up to ten friends or associates, enter their e-mail addresses below.

FIG 9

First Name		Last Name	
E-mail			
Title			
Phone			
Organization			
Note to Associate			

First Name		Last Name	
E-mail			
Title			
Phone			
Organization			
Note to Associate			

First Name		Last Name	
E-mail			
Title			
Phone			
Organization			
Note to Associate			

Welcome to the BizActions Management Center! This center provides access to all syst management functions for staff, sales personnel, webmasters and BizAction management. Cli on your choice to continue.

	Function	Description
USING THIS SYSTEM		
●	1	About BizActions
●	2	Ask Questions/Provide Feedback/Add New System Requirement
●	3	Frequently Asked Questions
●	4	Discussion Forum
●	5	Help Index
●	6	Knowledge Base
SPONSOR REGISTRATION AND MANAGEMENT		
●	7	Enter Sponsor Registration and Payment Information
●	8	Review/Edit Sponsor Registration Information
●	9	Enter Sponsor Payment Information
●	10	Review/Edit Sponsor Payment Information
●	11	Create/Edit Default Member Interest Categories
●	12	Upload Sponsor Logo
●	13	Enter Sponsor Client/Prospect Information
●	14	Review/Edit Sponsor Client/Prospect Information
●	15	Generate Sample E-mail Message
●	16	Review/Edit Sponsor Welcome Letter
●	17	Review/Edit Sponsor Team Members
●	18	Review Sponsor Agreement
SYSTEM DOCUMENTATION/AIDS		
●	19	Access Price Data Sheet
●	20	Access Sponsor Client Data File Upload Specifications
SPONSOR MANAGEMENT REPORTS		
●	21	Summary Sponsor Registration Report
●	22	Open Registrations Report
●	23	Sponsor Registration Report (Sorted Chronologically)
●	24	Sponsor Registration Report (Sorted Alphabetically)

E1610

	24	Sponsor Registration Report (Sorted Alphabetically)
SALES MANAGEMENT		
	25	Access Sales Script
	26	Summary Sales Report by Sales ID
	27	Payment Status Report
	28	Sales Contact Report
	29	Prospect Followup Status Report
FINANCIAL REPORTS		
	30	Accounts Receivable Aging Report
	31	Detailed Sponsor Payment Report
	32	Enter Payments Information
	33	Summary Revenue Report
	34	Payment Status Report
	35	Credit Card Transactions Pending Report
	36	Accounts Payable Report
MANAGEMENT REPORTS		
	37	Summary Sponsor Registration Report
	38	Review Feedback Comments
	39	Review Web Statistics
	40	Review Sponsor Registrations
	41	Review Member Registrations
MEMBER MANAGEMENT		
	42	Enter Member Registration Information
	43	Review/Edit Member Profile
	44	Member Registration Report
	45	Review/Edit Member Security Hierarchy
	46	Review Member Agreement
CONTENT DEVELOPMENT		
	47	Enter New BizAction Author and Send Welcome Letter
	48	Review/Edit BizAction Author Profile
	49	Author Registration Report

FIG 1

	50	Enter BizAction Items
	51	Review/Edit/Approve Public BizAction Items
	52	Review/Edit Sponsor Private BizAction Items
	53	Upload BizAction Article Files
	54	Access Full BizAction Item Record and Experts
	55	BizAction Item Master Content Report (Sorted by BizAction Type)
	56	BizAction Item Quantitative Summary Report

ADVERTISING MANAGEMENT

	57	Enter Advertiser Registration and Payment Data
	58	Review/Edit Advertiser Registration and Payment Data
	59	Advertiser Registration Report
	60	Advertiser Activity Report
	61	Access Advertiser Data Sheet
	62	Modify Advertising System Parameters
	63	Review Advertiser Agreement

BANNER AD MANAGEMENT

	64	Enter Banner Ad Information
	65	Review/Edit Banner Ad Information
	66	Browse Banner Ads- BizActions
	67	Browse Banner Ads- Advertisers
	68	Browse Banner Ads- Experts
	69	Browse Banner Ads-Sponsors
	70	Browse Banner Ads- Templates
	71	Purchase Banner Ad Campaign
	72	Review/Edit Banner Ad Campaign
	73	Banner Ad Impressions and Click Data Report
	74	Upload Custom Banners
	75	Request Custom Banner Ad Services
	76	Banner Ad Standards & Specifications

RESOURCE MANAGEMENT

	77	Enter Expert Registration and Payment Information

F16
12

⊙	78	Review/Edit Expert Registration Information
⊙	79	Create Service Profile
⊙	80	Set Service Profile to Sponsor Assignments and Issue Invoice
⊙	81	View/Edit Service Profiles
⊙	82	Upload Expert Logo
⊙	83	Upload Expert Photo
⊙	84	Expert Registration Report
⊙	85	Browse Expert Directory
⊙	86	Modify Expert System Parameters
⊙	87	Review Expert Agreement
AFFILIATE WEB SITE MANAGEMENT		
⊙	88	Enter Aggregator/Web Site Affiliate Information
⊙	89	Review/Edit Aggregator/Web Site Affiliate Data
⊙	90	Enter Standard Pricing and Discount Codes
⊙	91	View/Edit Standard Pricing and Discount Codes
⊙	92	View Affiliate Report
⊙	93	View/Edit Public Sponsor Pricing
⊙	94	Generate Acceptance Message
SYSTEM MANAGEMENT		
⊙	95	Enter/Edit Interest Categories
⊙	96	Interest Categories Report
⊙	97	Enter/Edit Group Types
⊙	98	Enter/Edit BizAction Types
⊙	99	BizAction Types Report
⊙	100	Enter/Edit Industry Data
⊙	101	Process Unsubscribes
⊙	102	Change Member to Text Only Email Format
⊙	103	Change Member to HTML Email Format
⊙	104	Set All Sponsor Members to New
⊙	105	Assign Sponsor Default Interests to All Sponsor Members

E16
12
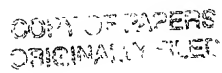
	106	Manual Launch Process
	107	View/Edit Sponsor Launch Settings
	108	Launch Settings Report
	109	New System Requirements Report

Disclaimer | Privacy Statement | Feedback | Press Releases | What's New | Copyright 2001

FIG 13

FIG 14

Sponsor Payment Information Entry Form

Instructions: This form is intended for use by sales personnel entering payment information for new sponsors. The pricing will be determined in negotiation with the sponsor. Enter the key pricing parameters here. Mandatory fields are indicated in bold.

Item		Instructions
Sponsor ID		Enter the Sponsor ID. You can obtain this from the View/Edit Sponsor Profiles Report.
Sponsor Name		Enter the Sponsor Organization name. Use the one above if completing that registration.
Agreement Date		Enter the date of this agreement or registration Use MM/DD/YY format.
Service Start Date		Enter the date that service is to commence. Billing will occur prior to that date. Use MM/DD/YY format.
SERVICE OPTIONS		
Sponsor Messages Only Option	No	Enter whether only sponsor messages will be included in generated messages. This is an option sometimes requested by association or company sponsors.
Private Database Option	No	Enter the separate charge for private database setup, if applicable. This option provides increased security through a separate database instance for the sponsor.
Get E-Mails Option	No	Indicate whether the sponsor wants BizActions to obtain their client e-mail addresses.
No Banner Ads Option	No	Indicate whether the sponsor wants BizActions to not include banner ads..
Free Messages Allowed		If you provide "free" e-mails as part of the negotiation, enter them here. No charges will accrue until after this number is exceeded.
PRICING INFORMATION		
Price Per 12 Custom Emails		Enter cost per block of 12 custom e-mail from pricing sheet.
Annual System Setup and Maintenance Charge		Enter the annual system setup and maintenance charge, if any (One time charge). See pricing sheet.
Private Database Charge		Enter the separate charge for private database setup, if applicable, from pricing sheet. (One time charge).
Service Description	Select One	Select a description of the number of contacts (Example "Up to 2,000")
"Get Email" price per E-mail		Enter the cost per e-mail address acquisition. Billing will occur based on e-mails acquired.
Any Special Notes or Agreement Terms		Enter any special agreements or terms that were negotiated. This will display on the services agrement. Enter "None", if none.
Annual Subscription Charge		Enter a annual subscription charge, if any.
Total Subscription and Setup/Maint. Cost		Enter the total annual subscription and setup/maint. charge.
CONTACT INFORMATION		
Billing Point of Contact		Indicate the principal billing contact.
Billing E-mail		Enter the principal P.O.C. e-mail address. This is where all bills will be sent.
Billing Address		Enter billing address.

sponsorpaymententry4 - Entry Form

Billing City		Enter billing city.
Billing State	Select One	Enter billing state.
Billing Zip		Enter billing zip.
Billing Phone		Enter billing phone.
PAYMENT INFORMATION		
Payment Method	Select One	Select the payment method to be used.
Credit Card Number		Enter credit card number. Do not use spaces or hyphens.
Credit Card Type	Select One	Indicate the type of credit card
Expiration		Indicate card expiration in MM/DD/YY format.
Name on Credit Card		Indicate the name on the credit card.
Payment Interval	Annually	Indicate the desired interval for payment. Billing will occur thirty days prior to service period commencement.
Initial Deposit	0	Indicate any initial deposit amount. Cover the one time charges, at a minimum.
CUSTOM PAYMENT INFORMATION (Use this section to create a custom payment profile by quarter. Note: You must have selected "Quarterly" for the payment interval above. Do not use this section for "Annual" payment intervals.)		
Quarterly Payment 1 Amount	0	Enter first payment after deposit, if any. If none, leave the '0' in the fields.
Quarterly Payment 2 Amount	0	Enter second payment after deposit, if any. If none, leave the '0' in the fields.
Quarterly Payment 3 Amount	0	Enter third payment after deposit, if any. If none, leave the '0' in the fields.
Quarterly Payment 4 Amount	0	Enter fourth payment after deposit, if any. If none, leave the '0' in the fields.
Quarterly Payment 1 Date	30-Oct-01	Enter Payment Due Date for first payment. Use MM/DD/YYYY format.
Quarterly Payment 2 Date	30-Oct-01	Enter Payment Due Date for first payment. Use MM/DD/YYYY format.
Quarterly Payment 3 Date	30-Oct-01	Enter Payment Due Date for first payment. Use MM/DD/YYYY format.
Quarterly Payment 4 Date	30-Oct-01	Enter Payment Due Date for first payment. Use MM/DD/YYYY format.
ADMINISTRATIVE INFORMATION		
Sales Rep ID		Enter your Sales or Member ID. Important: The e-mail will not send without a valid sales member ID.

Review Invoice   Reset

FIG 14 (cont)

Upload Sponsor Logo

To upload your sponsor logo, enter the information below. If you already identified a logo URL referencing your web site, you do not need to provide this information. However, we recommend that you provide the logo in case your server is inoperative and the logo file is not accessible.

Required Logo dimensions are width- 250 X height-90. Only .jpg and .gif file formats are supported.

File Name:	
File:	Browse...
Upload File	

FIG 15

Sponsor Client Data Entry Form

Instructions: This form is a backup method for entrying sponsor client data one record at a time. It is recommended that the sponsor send an excel file with a minimim of e-mail, first name, last name, phone, and client type instead of using this form.

. You can complete this form with a minimum of the mandatory bolded fields.

Field		Instructions
Sponsor_ID		Enter Sponsor ID. You can obtain this from the Sponsor registration report. Keep this handy if you are entering a series of names.
MP_LastName		Enter client last name.
MP_FirstName		Enter client first name.
MP_MemberType	Business Client	Indicate the type of member.
MP_Email		Enter client e-mail address.
MP_Phone		Enter client phone.
MP_Organization		
MP_EntityType		
MP_Title		
MP_Street		
MP_City		
MP_State		
MP_Zip		
MP_Fax		
MP_UpdatedDate		(i.e. 12/31/97)
MP_UpdatedBy		
MP_AnniversaryDate		(i.e. 12/31/97)
MP_EMailFormat		
MP_Web_URL		
MP_SecurityLevel		
MP_LeadSponsorPOC		
MP_MembershipRqrd		
MP_SponsorExclusive		
MP_CityGovt		

E16 16

MP_CountyGovt		
MP_Industry		
MP_IndustryKeyWord1		
MP_IndustryKeyWord2		
MP_IndustryKeyWord3		
MP_SICCode		
MP_NAISCCode		
MP_POCMain		
MP_SalesVolume		
MP_NumberEmployees		
MP_YearEndDate		
MP_ReferralPOC		

Insert Data

E16 (cont)

FIG 17

Sponsor Registration Entry Form

Instructions: This form is intended for use by sales personnel creating profiles for new sponsors. At a minimum, complete the mandatory fields that are indicated in bold below. Note the instructions next to each field. Click "submit" at the bottom of the form when complete.

Item		Instructions
REQUIRED FIELDS		
Organization Name		Enter the Sponsor Organization name.
Address 1		Enter the Sponsor address. Use a local address, if more than one division of the organization are participating.
Address 2		Enter second address line, if required.
City		Enter Sponsor office city
State	Select One	Enter Sponsor office state (VA, MD)
Zip		Enter Sponsor office zip code. Either 5 or 9 digit codes are acceptable.
Country	United States	Select the principal country of operation.
First Name		Specify the main point of contact first name.
Last Name		Specify the main point of contact last name.
E-Mail		Enter main contact e-mail address.
Phone		Enter main contact phone number
Password	Re-enter Password	Enter main point of contact password.
Updated Date		Specify date that you created or updated this record.
Updated By		Enter your sales or member ID.
CoBrand (Yes/No)	Yes	Indicate if sponsor co-brand will be applied (Yes/No).
OPTIONAL FIELDS		
Fax		Enter primary contact phone number
Industry	Select One	Provide sponsor self-description of industry.
Referral Contact		If this sponsor sale is a result of a referral, enter the referral name.
Logo URL		Specify Logo URL, if known. Otherwise, this will be automatically assigned. Sponsor should provide logo measuring no larger than 200 X 80 Pixels.
SPONSOR E-MAIL MENU BAR SET UP		
Your Web Site URL		Provide a Sponsor Web Site URL.

Organization Description		Provide up to 1,000 word summary description of organization. This will be used to provide a sponsor description from the cobranded e-mails.
Menu Bar Function 1 Title		Provide one to two words for first menu bar choice above your sponsor e-mail.
Menu Bar Function 2 Title		Provide one to two words for second menu bar choice above your sponsor e-mail.
Menu Bar Function 3 Title		Provide one to two words for third menu bar choice above your sponsor e-mail.
Menu Bar Function 4 Title		Provide one to two words for fourth menu bar choice above your sponsor e-mail.
Menu Bar Function 5 Title		Provide one to two words for fifth menu bar choice above your sponsor e-mail.
Menu Bar Function 1 URL		Provide a full URL path to the first menu bar choice.
Menu Bar Function 2 URL		Provide a full URL path to the second menu bar choice.
Menu Bar Function 3 URL		Provide a full URL path to the third menu bar choice.
Menu Bar Function 4 URL		Provide a full URL path to the fourth menu bar choice.
Menu Bar Function 5 URL		Provide a full URL path to the fifth menu bar choice.

Go to Step 2   Reset

FIG 17 cont

Sponsor ID:	1
Sponsor Name:	BizActions, LLC

Barry Friedman, welcome to your sponsor management center. This center provides access to all sponsor setu management, content creation, advertising and administration functions. Click on your choice to begin:

E16 18

	Function	Description
USING THIS SYSTEM		
◉	1	**Using This Sponsor Center**
◉	2	**Ask Questions/Provide Feedback/Add New System Requirement**
SETTING UP AND MANAGING YOUR ACCOUNT		
◉	3	**Step 1: Complete Your Sponsor Profile Information**
◉	4	**Step 2: Enter/Update Your Sponsor Team Members**
◉	5	**Step 3: Set Default Member Interest Preferences**
◉	6	**Step 4: Upload Your Client/Member/Prospect E-mail Addresses**
◉	7	**Step 5: Review/Edit/Update Your Client E-mail and other Information**
◉	8	**Step 6: Upload Your Sponsor Logo**
◉	9	**Step 7: Customize Sponsor Welcome Letter**
◉	10	**Step 8: Review Sample E-mail**
SPONSOR REPORTS		
◉	11	**Sponsor OLAP Reports**
◉	12	**Contact Me Status Report**
◉	13	**Referral Status Report**
◉	14	**Instructions for Using OLAP Cubes**
◉	15	**Using OLAP in Your Practice**
MEMBER/PROSPECT MANAGEMENT		
◉	16	**Enter Client Data**
◉	17	**Send Sample E-mail to Client/Member**
◉	18	**Export Client Data**
ADVERTISING MANAGEMENT		
◉	19	**Enter Banner Ad Information**
◉	20	**Purchase Banner Ad Campaign**

●	21	**Browse Banner Ads- Templates**
●	22	**Upload Custom Banners**
●	23	**Request Custom Banner Ad Services**
●	24	**Banner Ad Standards & Specifications**
●	25	**Block Banners Function**
CONTENT DEVELOPMENT		
●	26	**Search Public BizAction Item Database**
●	27	**Enter Sponsor BizAction Items**
●	28	**View/Edit Sponsor BizAction Items**
●	29	**Specify Banners**
●	30	**Sponsor Custom BizAction Item Report**
RESOURCE MANAGEMENT		
●	31	**Search Resource Directory**
●	32	**Create Sponsor Resource Profile**
●	33	**View/Edit Resource Profile**
●	34	**Create Service Profile**
●	35	**View/Edit Service Profile**
●	36	**Resource Blocking Function**

Disclaimer | Privacy Statement | Feedback | Press Releases | What's New | Copyright 200

E1619

EIG 20

Sponsor Registration Entry Form

Use this form to update your critical sponsor information. Your existing information is displayed below. This infor includes the menu bar setup that is displayed on your custom bizactions e-mail messages. After changing the in can view the changes by clicking on the "Review Sample E-mail" function.

IMPORTANT: Note that if you change the lead point of contact information here, this will require adding the old into the team center as a new team member if they are still to be a team member. We do not automatically retai team member this since they may have left the firm.

Item		Instructions
REQUIRED FIELDS		
Organization Name	BizActions, LLC	Enter the Sponsor Organi
Address 1		Enter the Sponsor addres address, if more than one the organization are partic
Address 2		Enter second address line
City		Enter Sponsor office city
State		Enter Sponsor office state
Zip		Enter Sponsor office zip c or 9 digit codes are accep
Country	United States	Select the principal countr operation.
First Name	Barry	Specify the main point of name.
Last Name	Friedman	Specify the main point of name.
E-Mail	bjfriedman@ex-pressnet.com	Enter main contact e-mail
Phone	301.545.0477	Enter main contact phone
Password	Re-enter Password	Enter main point of contac
OPTIONAL FIELDS		
Fax		Enter primary contact pho
Industry		Provide sponsor descriptio
Logo URL		Specify Logo URL, if know Otherwise, this will be aut assigned. Sponsor should measuring no larger than Pixels.
SPONSOR E-MAIL MENU BAR SET UP		
Your Web Site URL	http://www.bizactions.com/fac/fac.htm	Provide a Sponsor Web S
Organization Description		Provide up to 1,000 word description of organization used to provide a sponsor from the cobranded e-mai

Menu Bar Function 1 Title	Members	Provide one to two words bar choice above your spo
Menu Bar Function 2 Title	Sponsors	Provide one to two words menu bar choice above yo mail.
Menu Bar Function 3 Title	Experts	Provide one to two words menu bar choice above yo mail.
Menu Bar Function 4 Title	Advertisers	Provide one to two words menu bar choice above yo mail.
Menu Bar Function 5 Title	Contact Us	Provide one to two words bar choice above your spo
Menu Bar Function 1 URL	www.bizactions.com/frame-memcen.htm	Provide a full URL path to menu bar choice.
Menu Bar Function 2 URL	www.bizactions.com/frame-sponcen.htm	Provide a full URL path to menu bar choice.
Menu Bar Function 3 URL	www.bizactions.com/frame-expertcen.htm	Provide a full URL path to menu bar choice.
Menu Bar Function 4 URL	www.bizactions.com/frame-sponcen.htm	Provide a full URL path to menu bar choice.
Menu Bar Function 5 URL	www.bizactions.com/contactus/frame-contactus.htm	Provide a full URL path to menu bar choice.

Update Sponsor Profile   Reset

F16 (cont)
20

Upload Client Data

To upload your client list data file, enter the information below. Important: Please note that the file will overwrite the previously uploaded file. Make sure your file is cumulative or updated. We do not insert this uploaded data into the database automatically. All files are screened and manually formatted because of data format requirements. The minimum required fields in your client data file are (in the following order):

- First Name
- Last Name
- E-mail
- Phone:
- Member_Type: Identify Personal Client, Business Client, Prospect, Referral
- Sponsor Point of Contact (Note: The point of contact must be added as a team member for the system to route contact requests to this individual)

Acceptable file types are excel (.xls), access (.mdb) or tab delimited text file (.txt).

File:		Browse...
	Upload File	

FIG 21

Banner Data Entry

Enter a profile for each banner that is to be used in the system. You will also need to upload the banner using th Banner" function.

Item	Entry Field	Instructions
Mandatory		
Sponsor_ID		Use the sponsor ID that created the banner, if this is a sponsor banner. If not, leave blank. If th use Sponsor ID 1, which is the BizActions sponsor ID number.
Expert_ID		Use the expert ID that created the banner, if this is a expert banner. If not, leave blank.
Advertiser_ID		Use the advertiser ID that created the banner, if this is a advertiser banner. If not, leave blank.
Banner_Type	Select One	Select the banner type. This choice will determine how and where the banner is displayed.
FileNameURL		Indicate the file name for banner, if applicable.
AdServerURL		If this is an ad server banner, enter a URL reference with variables to the ad server.
BannerURLRef		Indicate the URL for banner click through page, if applicable.
Date_Updated		Enter Date Recorded Created
Updated By		Enter ID for individual entering data
Non Mandatory		
Banner_Title		Enter a short descriptive title for banner.
Banner_Description		Enter an extended description of the purpose of banner, especially if this is a templated banner
Banner_MoreInfo		
Banner_POC		Enter Developer point of contact. Use bizactions point of contact if this is for a bizactions or tem
Banner_POC Email		Enter Developer e-mail. Use bizactions e-mail if this is for a bizactions or templated banner.
Banner_POC Phone		Enter Developer phone. Use bizactions phone if this is for a bizactions or templated banner.

Insert Data

FIG 22

Partner ID:	1
Partner Name:	Accounting Web

Ryan Carmen, welcome to your partner management center. This center provides access to all partner setup, management administration functions. Click on your choice to begin:

	Function	Description
Using this System		
●	1	**Using this Partner Center**
●	2	**Ask Questions/Provide Feedback/Add New System Requirements**
Setting up and Managing Your Account		
●	3	**Upload Your Partner Logo**
Affiliate Reports		
●	4	**Partner Summary Report**
Affiliate Management		
●	5	**Select Banners or Advertorials**
●	6	**Preview Your Banner Landing Page**

Disclaimer | Privacy Statement | Feedback | Press Releases | What's New | Copyright 200

FIG. 23

Partner Report

Date:	Tuesday, October 30, 2001
Partner ID:	1
Partner Name:	Accounting Web
Contact Person:	Ryan Carmen
Phone Number:	

F I G 24

Select the desired period			Instructions
Period	All	to All	Use M/DD/YY format.
Channel	All		Select One.
	Display Report Reset		

Partner Activity

Period	Banners				Impressions	Click Throughs	Ratio
	Description	Size	ID	Location			
Jan	Get More Clients	468X60	100	Email 1	100	20	0.20
	Get More Clients	468X60	100	Email 2	150	30	0.20
	Built by CPAs	468X60	101	CT - More Info	200	10	0.05
	Built by CPAs	468X60	101	CT - Resources	300	20	0.07
	More Business	468X60	102	CT - Resources	100	5	0.05
					850	85	0.10
Feb	Get More Clients	468X60	100	Email 3	200	15	0.08
	Get More Clients	468X60	100	CT - More Info	150	15	0.10
	Built by CPAs	468X60	101	Email 1	100	20	0.20
	More Business	468X60	102	Email 2	100	2	0.02
	More Business	468X60	102	Email 3	550	52	0.09
					1200	100	.11
March	Get More Clients	468X60	100	Email 2	200	50	0.25
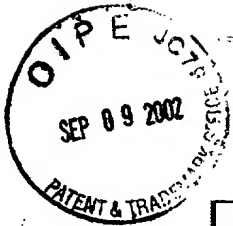
	Built by CPAs	468X60	101	Email 3		200	20	0.10
	More Business	468X60	102	CT - Resources		200	20	0.10
						600	90	0.15
Total						2,000	227	0.11

FIG 24 cont.